

Review of Tourism in Seminole County
Year 2002



Review of Tourism in Seminole County

I. The Economic Impact of Tourism

How does tourism play a role in our economy? An analysis of the tourism industry within the nation's economy and specifically Seminole County.

II. The Demographic Profile of Visitors to Seminole County

What types of visitors come to Seminole County? An analysis of the demographic segments that makeup the tourist population.

III. The Impact of Tourism Advertising

How does tourism advertising influence visitors to Seminole County? An analysis of influence and payback of tourism advertising.

Section I

The Economic Impact of Tourism



Travel & The Economy

How does tourism play a role in our economy? A brief analysis of the tourism industry within the nation's economy and specifically Seminole County.

Economic Impact of Travel

How much does travel and tourism impact Seminole County's economy? This section provides a detailed look at how tourism contributes to Seminole County.

Travel Volume

How many people travel? Tourism's economic impact begins with the traveler. This section presents data on the volume of travel to Seminole County.

Travel Expenditures

How much money do tourists spend? This section includes a break down of travel expenditure data.

Travel-Generated Tax Revenues

How much do tourists generate in tax revenues? This section itemizes the significant amount of money that the local government receives from taxes imposed on travelers and hospitality businesses.

Travel-Generated Employment

How many jobs can be attributed to the travel industry? This section provides an overview of the tourism jobs created in Seminole County.

Introduction



What is the travel industry?

How do you define travel and tourism?

Over the years, there has been considerable global discussion of the appropriate definition of travel. After years of careful study the World Tourism Organization (WTO) created the following definition for domestic travel:

"Any person residing in a country, who travels to a place within that country, outside his/her usual environment for a period not exceeding 12 months and whose main purpose of visit is other than an activity remunerated from within the place visited."

The WTO definition is conceptual in nature and difficult to incorporate within research projects. In practices, studies by various organizations over the years have incorporated different definitions of "travel away from home", which typically utilize a mileage level away from home to identify travelers. Most mileage levels range between 50 and 100 miles away from home as the criteria to define travel. These different definitions can in some aspects adhere to the WTO definition of a domestic traveler since the term 'outside his/her usual environment' is conceptual and, therefore, left open to interpretation and generalization based on the requirements of the research.¹

How do you define travel and tourism in Seminole County?

The word 'tourism' is used throughout much of the world to denote travel away from home. In the United States, however, it generally connotes travel for pleasure only. Nevertheless, for the purpose of this report, the term 'tourism' is synonymous with 'travel' and includes both business and leisure.

Specifically, for Seminole County, a tourist or traveler ...

- may not reside or work in Seminole County,
- has traveled more than 50 miles from home to reach Seminole County,
- may be in Seminole County for business or pleasure, and
- spends at least one night in Seminole County.

It is critical to note that this definition has changed from previous studies done by Choice Communications Systems Inc. for Seminole County. Previous studies did not restrict the definition of traveler to 'overnight' and '50 miles traveled from home'. Therefore, trending or comparing data from previous published studies will have erroneous results. All appropriate benchmarking are included in this study.

Section I

Travel and the Economy



How has travel performed nationally in the last two years?

In the past decade, travel and tourism in the U.S. benefited from a strong U.S. economy, one that exhibited steady growth in real GDP and real personal income. As a result, both domestic and international travelers' expenditures reached peak levels in 2000.

Affected by economic recession and the 9/11 terrorist attacks, 2001 stands in stark contrast. International travel volume to the U.S. declined 10.7 percent to 45.5 million visitors in 2001, compared to 50.9 million in 2000. Despite the events of 2001, the combined domestic and international travel spending in the U.S. was \$537.2 billion, however, this still was a 5.8 percent decrease from the previous year.¹

Overall, the Leisure segment has been the relative 'star' in the U.S. domestic travel. While domestic leisure travel increased 1.7% in 2002, growth was much subdued at the end of the year anticipating the war with Iraq. Furthermore, the public's rating of the economy is at a 10-year low.²

How has travel performed in Seminole County in the last two years?

Seminole County did not suffer as greatly in 2001 as many other tourist destinations. In fact, Seminole County fared well compared to national statistics. However, in 2002, as the national tourism industry struggled to maintain, it appears that Seminole County took a much harder hit.

If so, why?

In the first two-quarters of 2001, Seminole County experienced great growth in tourism. The economic slow-down did not affect the area until 3rd quarter. By the end of the third quarter with the events of 9/11, tourism came to halt nationally. Although greatly affected by the events, Seminole County tourism began to slowly emerge again in November and December of 2001. In fact, the drop-off of tourists in the fall of 2001 was not as great as what the rest of the nation was feeling.

Source: Choice Survey 2002, ¹ TIA, ² Gallup Poll

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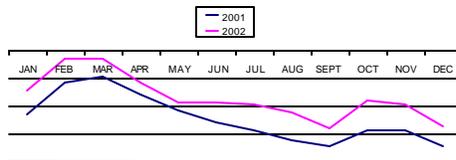
Section I Travel and the Economy



Although all tourists were affected by 9/11, some were less deterred than others. We found two major demographic segments were not as affected by the events of 9/11. First, the small business person, who traveled mostly by auto, still made business trips. These trips were shorter, with a smaller budget, but nevertheless, they still traveled.

On the leisure side, the older more affluent segment, who travels by auto, continued to travel. They were less affected by the down economy, and in some cases, were looking for new opportunities in travel because of anticipated discounting by the travel industry.

As 2002 began, things were looking up for Seminole County. During the first quarter of 2002, there was a rise in hotel occupancy and general travel, however, the levels still did not reach the previous years' numbers. Travelers to the area can be characterized by the curve on the table below. Although the overall curve remains similar, the overall volume of visitors is down.



Because the majority of travel to Seminole County is for business purposes, the business traveler has more of an effect on the overall performance of the tourism industry. When business travel decreases, Seminole County's tourism will decline at a greater rate compared to a more leisure oriented destination. While in 2001, the business traveler was Seminole's saving grace, it is now the leading factor in the economic downturn.

However, the business sector alone is not responsible for the decrease in tourism in Seminole County. The number of parties on leisure travel who visit family and friends also decreased.

Source: Choice Survey 2002

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Section I

Economic Impact



How is the economic impact on Seminole County determined?

First, Choice determines how visitors spend their money (expenditures) while in Seminole County.

Surveys were conducted in Seminole County using hand-held computers. Surveys were conducted with adults 18 years or older on a random basis at various sites throughout the County. The intercept surveys captured key details about the visitors, such as, expenditures by category, length of stay, location and type of accommodation, size of party, and demographic information. Average expenditures are then determined for different expenditure categories for different types of visitors. These expenditures by categories are then scaled to the total visiting population for the period of one year.

Second, Choice determines how the visitors' expenditures proliferate throughout Seminole County's economy.

Travelers produce secondary economic impacts over and above their original expenditures sometimes referred to as 'indirect spending'. Indirect spending occurs as travel industry businesses purchase goods and services from local suppliers, generating additional sales. Suppliers must, in turn, purchase goods and services from their suppliers. During this process, sales are generated in addition to those produced by the initial traveler expenditures. This chain of buying and selling continues until the initial traveler purchase completely 'leaks' out of the area. 'Multipliers' are one way of capturing this interaction and proliferation of visitors' dollars throughout Seminole County's economy. Choice uses multipliers from the RIMS II model to determine Economic Impact for Seminole County. The Regional Input-Output Modeling System (RIMS II) was prepared by the Regional Economic Analysis Division, Bureau of Economic Analysis of the U.S. Department of Commerce. Model estimates were obtained specifically for Seminole County.

Last, Choice calculates Economic Impact as the sum of the primary economic impact (expenditures) plus the secondary economic impact (additional dollars through multipliers).

Source: Choice Survey 2002

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Section I Economic Impact



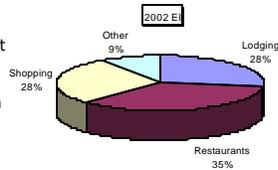
What is the economic impact of travel and tourism on Seminole County?

The 2002 Economic Impact (EI) from overnight visitors is approximately \$338 Million Dollars. Economic Impact can be further broken down into spending categories, such as, Lodging, Restaurants, Shopping, and Other.

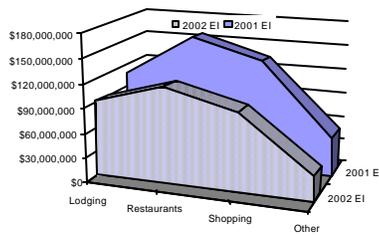
| 2002 | |
|-----------------|----------------------|
| Economic Impact | |
| Lodging | \$93,088,252 |
| Restaurants | \$118,043,107 |
| Shopping | \$95,454,369 |
| Other | \$31,262,635 |
| Total | \$337,848,363 |

Restaurants contributed the greatest share of the economic impact in 2002, where Lodging and Shopping were about the same.

'Other' includes tours, cruises, admission fees, tolls, parking, and other minor expenditures.



Because of the change in methodology, easy comparisons cannot be made to 2001. However, it is estimated that there is a 17% drop in Economic Impact (EI) as compared to 2001*. Lodging revenues dropped an estimated 13% - 15%, while retail categories dropped closer to 18%.



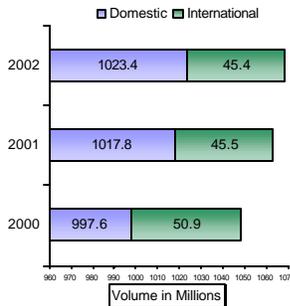
Source: Choice Survey 2002
 * Changes in methodology from previous year so comparisons are estimates only.
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Section I Travel Volume



What is the volume of travel in the U.S.?

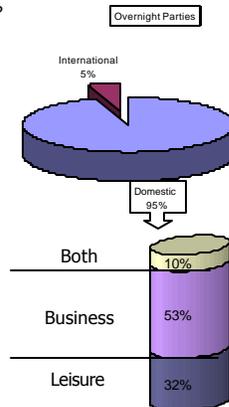
- The travel volume has continued to grow despite the events of 9/11 and the uncertainty of the economy over the past two years.
- Domestic leisure travel remains the strongest segment compared to domestic business or international travel.
- Domestic leisure travel, which includes visits to friends and relatives as well as outdoor recreation, entertainment, and travel for personal reasons, grew 4.2 percent in 2001 as compared to 2000, to total 773.5 million person-trips.
- Leisure travel accounted for 76% of all U.S. domestic travel in 2001 and possibly 86% of all U.S. domestic travel in 2002.¹



¹ Domestic and International Visitors TIA and DRI-WEFA

What is the volume of travel in Seminole County?

- Approximately 800,000 parties spent at least one night in a Seminole County hotel room. 95% of these parties are U.S. domestic visitors while 5% are international.
- 56% of the parties were on a business trip, 34% on a leisure trip, and 11% reported a combined trip of both business and leisure.
- The average party size for a business traveler holding a meeting with a prospect or client was 1.9 people. The average party size for a business traveler attending training or convention/seminar was 4.6 people.
- In 2002, there were a total of 396,043 domestic passengers at the Sanford Orlando International Airport (includes enplaning and deplaning passengers). This marks an increase of 47% from 2001. International passengers totaled 832,782 which is a drop of 4.4%.²



Source: Choice Survey 2002
² Sanford Orlando International Airport Statistics

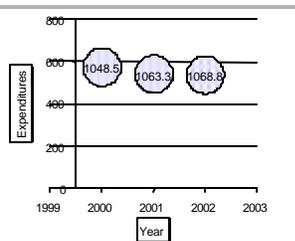
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Section I Travel Expenditures

How much do travelers spend in the U.S.?

- Domestic and international travelers spent \$537.2 billion in the U.S. during 2001 down 5.8 percent from 2002. U.S. resident travelers spent \$464.1 billion on travel-related goods and services within the U.S. in 2001, down 4.9 percent from 2000, while international travelers spent \$73.1 billion, an 11.1 percent decrease.
- Domestic travel expenditures grew steadily during the last decade, before declining 4.9 percent in 2001. An additional 0.4 percent decline is forecasted for 2002. Over the past ten years, domestic travel spending has increased by an annual average of more than 5%.

See chart: Expenditures in Billions, Travel Volume in Millions. Expenditure data from TIA, OTTI, DRI-WEFA.



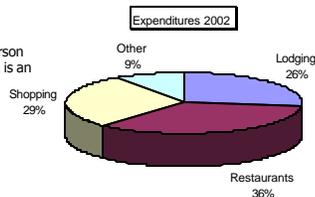
How do I read this chart?

Expenditures (in \$) are how high the bubbles rise on the chart. The size of the bubbles are how many travelers were spending money that year. Notice the size of the bubbles, i.e. the number of travelers, did not change radically. The bubbles slowly sink to show a decrease in overall spending.

How much do travelers spend in Seminole County?

- Overnight travelers to Seminole County spent approximately \$208.5 million in 2002, which is a 15% drop from 2001.*
- Restaurants captured the largest share of the expenditures (36%) with Shopping (29%) and Lodging (26%) second and third.
- Average spending varies widely depending on the demographic of the segment. 2002 saw the biggest decrease in Per-Person Shopping compared to earlier years, however, visitors still tended to spend money at restaurants. Overall, each person per day spent approximately \$81 which is an 18% drop from 2001.

| 2002 Expenditures | |
|-------------------|----------------------|
| Lodging | \$54,786,800 |
| Restaurants | \$74,124,400 |
| Shopping | \$59,939,949 |
| Other | \$19,631,168 |
| Total | \$208,482,317 |



Source: Choice Survey 2002

* Due to changes in methodology, care should be taken when comparing to the previous year.

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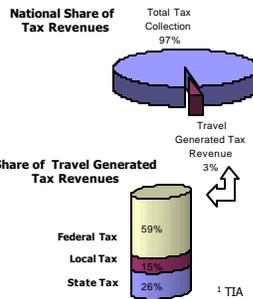
Section I

Travel-Generated Tax Revenue



How much tax revenue is generated through travel related tax receipts?

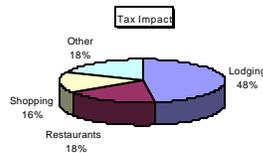
- Nationally, total travel spending in the U.S. generated \$98.8 billion in revenue for federal, state and local governments in 2001, accounting for 3.2 percent of all federal, state and local taxes collected in the nation.
- 2001 travel generated tax revenues were down 4.3 percent from their 2000 level due to decrease traveler spending.
- In local communities, travel generated tax revenue is a significant economic benefit by reducing the tax burden that would otherwise fall on local taxpayers.
- In 2001, total travel expenditures generated \$14.8 billion tax revenue for local governments, or 15.0 percent of total travel-generated tax revenue in the U.S.
- Each travel dollar produced nearly three cents in local tax.



How much travel-generated tax revenue is directed back to Seminole County?

- Tax Impact is a measure of tax dollars generated by the Economic Impact of each expenditure category (lodging, restaurants, etc.). In 2002, visitors generated \$5.1 million in tax revenues. Lodging contributes to almost all expenditure related tax revenues.
- Total expenditures in Lodging is approximately \$54.8 million. The 3% 'bed tax' produces \$1.6 million in tax revenue for Seminole County.
- Tourism generated at least an additional \$1.5 million in ad valorem taxes specifically for County schools, an increase over last year's \$1.4 million.

| | 2002 |
|--------------|--------------------|
| | Tax Impact |
| Lodging | \$2,437,314 |
| Restaurants | \$940,504 |
| Shopping | \$840,205 |
| Other | \$923,335 |
| Total | \$5,141,358 |



Source: Choice Survey 2002, ¹ TIA
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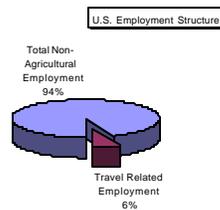
Section I

Travel-Generated Employment



How many people are employed because of the U.S. travel industry?

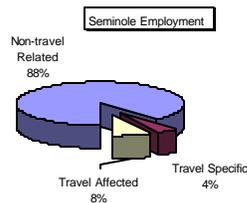
- In 2001, total traveler spending in the U.S. generated 7.9 million jobs, including both full-time and seasonal/part-time positions. The number of travel-generated jobs fell 0.5 percent compared to 2000.
- Travel-generated jobs in 2002, however, experienced a much deeper decline than in 2001, according to preliminary data through November 2002.
- The 7.9 million travel related jobs constituted 6.0 percent of total non-agricultural employment in the U.S. in 2001. Without these jobs, the 2001 national unemployment rate of 4.8 percent would have been 5.5 percentage points higher, or 10.3 percent of the total U.S. labor force.



¹ TIA

How many jobs in Seminole County are supported by the travel industry?

- Employment directly attributed to tourism expenditures is holding steady at 6,000. An additional 11,000 jobs in all other industries are indirectly affected by tourist spending.
- 'Lodging Establishments' remain in the top ten fastest growing industries in Seminole County by growing slightly over 3% from the previous year. Lodging Managers can expect to earn a median cash salary of \$49,715. First line supervisors of housekeepers and janitorial staff can expect to earn a median cash salary of \$22,525.
- 'Eating and Drinking Establishments' is the number four industry gaining the most jobs in Seminole County.
- Of the occupations gaining the most new jobs in 2002, 'retail sales person' heads the list with a total of 7,875 jobs. This marks an average yearly increase of 2.6%. The average hourly rate is \$9.50.



Source: Choice Survey 2002
Labor Market Info, TIA, Bureau of Labor Statistics, U.S. Department of Labor
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Section II

The Profile of Seminole Visitors



All Overnight Visitors

A detailed look at the characteristics of the Seminole visitor compared to the typical U.S. traveler.

Business and Leisure Visitors Sub-Segment

A comparison of the business visitor to the leisure visitor.

Hotel Visitors Sub-Segment

A detailed look at the visitor who stays in a hotel, motel or B&B.

Sanford Orlando Airport Visitors Sub-Segment

A detailed look at the visitor who enters Seminole County via the Sanford Orlando International Airport.

Section II

The Overnight Visitor



Seminole Visitor Summary

- 29% married, 71% single
- older baby boomer age
- Internet user
- 16% one person in household, 37% two people in household
- 33% child in household
- above average income to wealthy

Trip Characteristics

| | Overnight | Business | Leisure | Hotel |
|--------------------------|-----------|----------|---------|-------|
| Average Nights | 3.2 | 2.1 | 4.8 | 2.7 |
| Average Party Size | 2.1 | 1.9 | 3.3 | 3.2 |
| % Child in Party | 4% | 3% | 5% | 4% |
| Average Dollars per Trip | \$450 | \$497 | \$372 | \$535 |

Demographic Profile of All U.S. Travelers :

- 63% married, 37% single
- baby boomer age, parents or just couples
- 57% completed college or more
- 42% employed in a managerial or professional position
- 22% one person in household, 35% two people in household
- 36% child in household
- \$57,800 median income
- 77% own home, 19% rent

Overnight

| Lodging | |
|----------------------------------|--------------|
| Hotel | 94% |
| Friends/Family | 5% |
| Other | 1% |
| Transportation | Multi Respor |
| Plane - Orlando International | 27% |
| Plane - Orlando Sanford Internat | 2% |
| Plane - Other airport | 3% |
| Your own car | 24% |
| Rental car | 28% |
| Taxi service/shuttle | 4% |
| Arranges Business Travel | |
| Miscel | 43% |
| Assistant or Co-worker | 22% |
| Travel Agent | 28% |
| Other | 7% |
| Part of Larger Trip | |
| No | 62% |
| Yes | 38% |
| First Time in Seminole | |
| No | 78% |
| Yes | 22% |
| Trip Activities | Multi Respor |
| Nature parks or recreational are | 14% |
| Shopping | 32% |
| Sports event | 27% |
| Golf | 5% |
| Guided cruise or tour | 2% |
| Special event | 6% |
| Other | 0% |
| Internet Use | |
| Yes | 82% |
| No | 18% |
| Marital Status | |
| Married | 29% |
| Single | 71% |
| Age | |
| Under 18 | 0% |
| 18-24 | 2% |
| 25-34 | 18% |
| 35-44 | 24% |
| 45-54 | 23% |
| 55-64 | 16% |
| 65-74 | 8% |
| 75+ | 3% |
| Denied | 1% |
| Household Income | |
| Below \$25,000 | 2% |
| \$25,000 to \$49,999 | 14% |
| \$50,000 to \$74,999 | 19% |
| \$75,000 to \$99,999 | 52% |
| \$100,000 to \$124,999 | 8% |
| \$125,000 or greater | 34% |

Source: Choice Survey 2002, ¹ TIA

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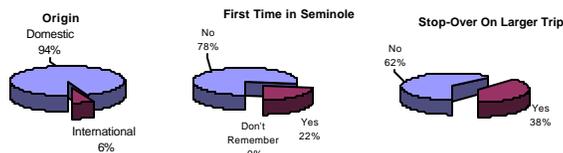
Section II

The Overnight Visitor

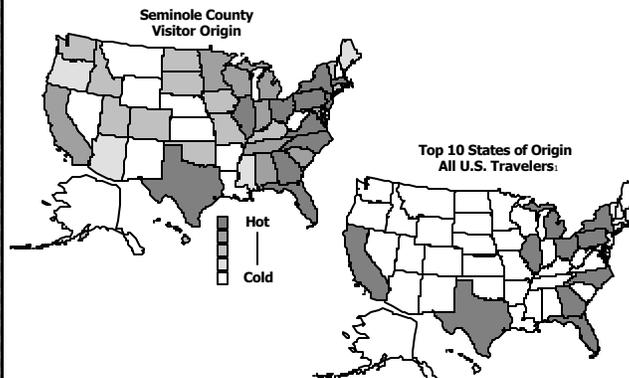


Seminole Visitor Origin

- Travelers to Seminole County are mostly domestic to the U.S. Only 6% are international.
- 22% of visiting parties reported that this was their first trip to Seminole County, while 78% have visited before.
- For most visitors, Seminole County was their primary destination. 38% stopped in Seminole on their way to another destination.



- Travelers to Seminole County live throughout the U.S. The map below represents the 'hot spots' of where travelers live.
- The map has similarities to the Top 10 States of Origin for All U.S. Travelers.



Source: Choice Survey 2002, national data from TIA
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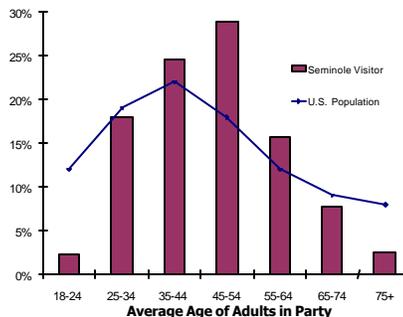
Section II

The Overnight Visitor



Seminole Visitor by Age Group

- The graph on the right illustrates the percentage of visitors by age compared to the percentage of the total U.S. population by the same age groups.
- Notice that the Seminole visiting population has a higher percentage of the 35-64 segment compared to the general U.S. population. In other words, Seminole County attracts a greater share of the Baby Boomer households.
- Seminole County also has a higher percentage of 35-54 segment than the national profile of travelers.



U.S. Baby Boomer Trip Profile Age 35-54¹

- 66% travel by own auto, 24% air, 3% rental car
- 5% rent car as secondary mode of transportation
- 64% leisure, 25% business, 8% combined
- 3.3 nights average
- 59% lodging in hotel/motel/b&b, 34% family/friends
- 2.2 people average household travel party size
- \$489 average spending on trip
- 32% include child on trip
- 31% shopping, 16% outdoor, 13% historical/museums
- 31% summer, 25% spring, 23% fall, 21% winter
- 3% group tour
- 45% in-state trips

U.S. Mature Trip Profile Age 55+¹

- 71% travel by own auto, 19% air, 2% rental car
- 5% rent car as secondary mode of transportation
- 74% leisure, 14% business, 8% combined
- 3.8 nights average
- 52% lodging in hotel/motel/b&b, 42% family/friend
- 1.7 people average household travel party size
- \$476 average spending per trip
- 6% include child on trip
- 31% shopping, 15% historical places, 12% cultural events, 12% outdoor
- 28% summer, 26% fall, 25% spring, 21% winter
- 5% group
- 42% in-state trips

Source: Choice Survey 2002, ¹ national statistics from TIA
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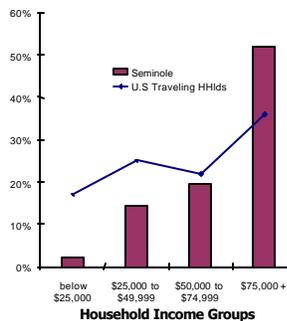
Section II

The Overnight Visitor



Seminole Visitor by Income Group

- The graph on the right illustrates the percentage of visitor parties by income groups compared to the percentage of the total U.S. travel volume by the same income groups.
- Notice that the Seminole visiting population has a higher percentage of the upper income segment compared to the general U.S. traveling population. In other words, Seminole County attracts a greater share of the of the highest income houses.
- The percentage of Seminole visitors with household income of \$50k-\$75k is about equal to the national profile of travelers.



U.S. Top Income Trip Profile \$75,000+ ¹

- 59% travel by own auto, 33% air, 3% rental car
- 11% rent car as secondary mode of transportation
- 61% leisure, 28% business, 9% combined
- 3.6 nights average
- 62% lodging in hotel/motel/b&b, 33% family/friends
- 1.9 people average household travel party size
- \$611 average spending on trip
- 20% include child on trip
- 30% shopping, 14% outdoor, 13% historical/museums
- 29% summer, 26% spring, 24% fall, 21% winter
- 2% group tour
- 39% in-state trips

U.S. High Income Trip Profile \$50,000 - \$75,000 ¹

- 71% travel by own auto, 21% air, 3% rental car
- 7% rent car as secondary mode of transportation
- 69% leisure, 20% business, 8% combined
- 3.4 nights average
- 55% lodging in hotel/motel/b&b, 38% family/friend
- 2.1 people average household travel party size
- \$443 average spending per trip
- 26% include child on trip
- 32% shopping, 14% historical places, 10% cultural events, 16% outdoor
- 30% summer, 24% fall, 25% spring, 21% winter
- 3% group
- 45% in-state trips

Source: Choice Survey 2002, ¹ national statistics from TIA
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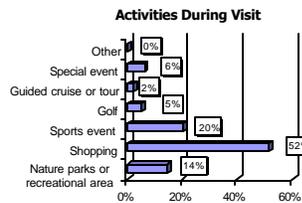
Section II

The Overnight Visitor



Trip Activities while in Seminole County

- Shopping was the most popular activity while in Seminole County. Half of all visiting parties shopped as part of their visit.
- Sporting events as well as outdoor activities including parks/recreational areas were second and third respectively. Together, outdoor activities such as Golf, Sports event, and Parks/Recreational Areas represent 39% of all the activity.
- Nationally, 34% of all person-trips includes shopping while 23% participate in outdoor activities.
- Compared to national numbers, Seminole County visitors are more likely to participate in outside activities and go shopping.



U.S. Shopping Activity Profile ¹

- 74% travel by own auto, 19% air, 3% rental car
- 6% rent car as secondary mode of transportation
- 80% leisure, 7% business, 10% combined
- 4.2 nights average
- 49% lodging in hotel/motel/b&b, 48% family/friends
- 2.2 people average household travel party size
- \$563 average spending on trip
- 26% include child on trip
- 31% summer, 23% spring, 24% fall, 22% winter
- 3% group tour
- 43% in-state trips

U.S. Outdoor Activity Profile ¹

- 79% travel by own auto, 14% air, 3% rental car
- 6% rent car as secondary mode of transportation
- 88% leisure, 3% business, 7% combined
- 4.7 nights average
- 42% lodging in hotel/motel/b&b, 48% family/friends
- 2.4 people average household travel party size
- \$566 average spending on trip
- 33% include child on trip
- 45% summer, 22% spring, 21% fall, 12% winter
- 4% group tour
- 51% in-state trips

Source: Choice Survey 2002, ¹ national statistics from TIA
2003 Choice Communications Systems Inc.

Section II

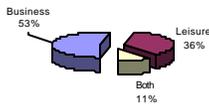
The Business and Leisure Visitors



Purpose of Trip in Seminole

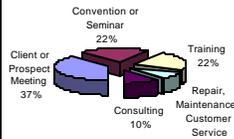
- 53% of all visiting parties were here exclusively for business; 36% visited exclusively for leisure reasons. Additionally, 11% combined their trip to Seminole as both business and leisure.

Purpose of Trip



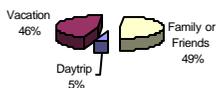
- The primary purpose of the business trip was to hold a meeting (37%), attend a convention or seminar (22%), or training (22%).

Business Reason



- The primary purpose of the leisure trip was to either visit family and friends or vacation.

Leisure Reason



Source: Choice Survey 2002

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Leisure

| Lodging | Multi Respon |
|----------------|--------------|
| Hotel | 88% |
| Friends/Family | 11% |
| Other | 1% |

| Transportation | Multi Respon |
|----------------------------------|--------------|
| Plane - Orlando International | 20% |
| Plane - Orlando Sanford Internat | 2% |
| Plane - Other airport | 2% |
| Your own car | 37% |
| Rental car | 22% |
| Taxi service/shuttle | 2% |

| Leisure Trip Planner | Multi Respon |
|----------------------|--------------|
| Male | 48% |
| Female | 43% |
| Both | 8% |
| Other | 1% |

| Part of Larger Trip | Multi Respon |
|---------------------|--------------|
| No | 55% |
| Yes | 45% |

| First Time in Seminole | Multi Respon |
|------------------------|--------------|
| No | 79% |
| Yes | 21% |

| Trip Activities | Multi Respon |
|-----------------------------------|--------------|
| Nature parks or recreational area | 17% |
| Shopping | 46% |
| Sports event | 26% |
| Golf | 3% |
| Guided cruise or tour | 2% |
| Special event | 5% |
| Other | 0% |

| Internet Use | Multi Respon |
|--------------|--------------|
| Yes | 74% |
| No | 26% |

| Marital Status | Multi Respon |
|----------------|--------------|
| Single | 32% |
| Married | 68% |

| Age | Multi Respon |
|----------|--------------|
| Under 18 | 0% |
| 18-24 | 3% |
| 25-34 | 17% |
| 35-44 | 17% |
| 45-54 | 25% |
| 55-64 | 20% |
| 65-74 | 13% |
| 75+ | 9% |
| Denied | 1% |

| Household Income | Multi Respon |
|----------------------|--------------|
| below \$25,000 | 4% |
| \$25,000 to \$49,999 | 19% |
| \$50,000 to \$74,999 | 23% |
| \$75,000 to \$99,999 | 10% |
| \$100,000 or greater | 26% |

Business

| Lodging | Multi Respon |
|----------------|--------------|
| Hotel | 99% |
| Friends/Family | 0% |
| Other | 1% |

| Transportation | Multi Respon |
|----------------------------------|--------------|
| Plane - Orlando International | 31% |
| Plane - Orlando Sanford Internat | 1% |
| Plane - Other airport | 3% |
| Your own car | 17% |
| Rental car | 31% |
| Taxi service/shuttle | 5% |

| Arranges Business Travel | Multi Respon |
|--------------------------|--------------|
| Myself | 40% |
| Assistant or Co-worker | 21% |
| Travel Agent | 26% |
| Other | 7% |

| Part of Larger Trip | Multi Respon |
|---------------------|--------------|
| No | 69% |
| Yes | 31% |

| First Time in Seminole | Multi Respon |
|------------------------|--------------|
| No | 77% |
| Yes | 23% |

| Trip Activities | Multi Respon |
|-----------------------------------|--------------|
| Nature parks or recreational area | 7% |
| Shopping | 41% |
| Sports event | 6% |
| Golf | 6% |
| Guided cruise or tour | 1% |
| Special event | 6% |
| Other | 0% |

| Internet Use | Multi Respon |
|--------------|--------------|
| Yes | 89% |
| No | 11% |

| Marital Status | Multi Respon |
|----------------|--------------|
| Single | 27% |
| Married | 73% |

| Age | Multi Respon |
|----------|--------------|
| Under 18 | 0% |
| 18-24 | 2% |
| 25-34 | 19% |
| 35-44 | 30% |
| 45-54 | 32% |
| 55-64 | 12% |
| 65-74 | 4% |
| 75+ | 1% |
| Denied | 1% |

| Household Income | Multi Respon |
|----------------------|--------------|
| below \$25,000 | 7% |
| \$25,000 to \$49,999 | 10% |
| \$50,000 to \$74,999 | 17% |
| \$75,000 to \$99,999 | 10% |
| \$100,000 or greater | 40% |

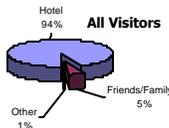
Section II

The Hotel Visitor

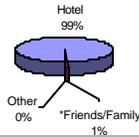


Hotels/Motels/B&B Visitors in Seminole County

- 94% of all visitors to Seminole County (defined by this study) stayed in a hotel, motel or b&b. 5% stayed with family or friends.



*Hotel visitors who also stayed with family or friends



- 1% of visitors staying in hotel/motel/b&b also stayed with family or friends.

U.S. Hotel Profile ¹

- 56% travel by own auto, 32% air, 4% rental car
- 12% rent car as secondary mode of transportation
- 54% leisure, 32% business, 11% combined
- 3.2 nights average
- 49% lodging in hotel/motel/b&b, 48% family/friends
- 1.9 people average household travel party size
- \$674 average spending on trip
- 18% include child on trip
- 31% summer, 26% spring, 24% fall, 19% winter
- 4% group tour
- 36% in-state trips

Source: Choice Survey 2002, ¹ national statistics from TIA
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| Hotel | |
|-----------------------------------|---------------------|
| Lodging | |
| Hotel | 99% |
| Friends/Family | 1% |
| Other | 0% |
| Transportation | Multi Respon |
| Plane - Orlando International | 27% |
| Plane - Orlando Sanford Internat | 2% |
| Plane - Other airport | 2% |
| Your own car | 24% |
| Rental car | 28% |
| Taxi service/shuttle | 4% |
| Leisure Trip Planner | |
| Male | 48% |
| Female | 42% |
| Both | 8% |
| Other | 1% |
| Part of Larger Trip | |
| No | 63% |
| Yes | 37% |
| First Time in Seminole | |
| No | 78% |
| Yes | 22% |
| Trip Activities | Multi Respon |
| Nature parks or recreational area | 11% |
| Shopping | 52% |
| Sports event | 22% |
| Spa | 6% |
| Guided cruise or tour | 2% |
| Special event | 6% |
| Other | 0% |
| Internet Use | |
| Yes | 83% |
| No | 17% |
| Marital Status | |
| Single | 26% |
| Married | 74% |
| Age | |
| Under 18 | 0% |
| 18-24 | 2% |
| 25-34 | 18% |
| 35-44 | 25% |
| 45-54 | 30% |
| 55-64 | 15% |
| 65-74 | 7% |
| 75+ | 2% |
| Denied | 1% |
| Household Income | |
| below \$25,000 | 2% |
| \$25,000 to \$49,999 | 14% |
| \$50,000 to \$74,999 | 19% |
| \$75,000 to \$99,999 | 11% |
| \$100,000 to \$149,999 | 8% |
| \$150,000 or greater | 35% |

Section II

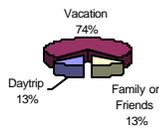
The Sanford Orlando Airport Visitor



Visitors to Seminole who used Sanford Airport

- Visitors that used Sanford Orlando International Airport were more like to stay in a hotel than with family or friends.
- From the airport, most rented a car or used a taxi service.
- 44% had never been to Seminole before.
- Almost two-thirds were here for vacation and shopping was the most favorite activity.

Leisure Reason



* small sample

U.S. Air Travel Profile ¹

- 32% rent car as secondary mode of transportation
- 58% leisure, 29% business, 11% combined
- 5.6 nights average
- 69% lodging in hotel/motel/b&b, 32% family/friends
- 1.5 people average household travel party size
- \$878 average spending on trip
- 11% include child on trip
- 37% shopping, 20% historical places
- 30% summer, 28% spring, 20% fall, 22% winter
- 3% group tour
- 9% in-state trips

Air*

| | |
|-----------------------------------|---------------------|
| Lodging | |
| Hotel | 94% |
| Friends/Family | 6% |
| Other | 0% |
| Transportation | Multi Respor |
| Plane - Orlando International | 0% |
| Plane - Orlando Sanford Internat | 47% |
| Plane - Other airport | 0% |
| Your own car | 0% |
| Rental car | 32% |
| Taxi service/shuttle | 11% |
| Leisure Trip Planner | |
| Male | 44% |
| Female | 44% |
| Both | 11% |
| Other | 0% |
| Part of Larger Trip | |
| No | 33% |
| Yes | 67% |
| First Time in Seminole | |
| No | 56% |
| Yes | 44% |
| Trip Activities | Multi Respor |
| Nature parks or recreational area | 14% |
| Shopping | 86% |
| Sports event | 0% |
| Golf | 0% |
| Guided cruise or tour | 0% |
| Special event | 0% |
| Other | 0% |
| Internet Use | |
| Yes | 78% |
| No | 22% |
| Marital Status | |
| Single | 22% |
| Married | 78% |
| Age | |
| Under 18 | 0% |
| 18-24 | 0% |
| 25-34 | 17% |
| 35-44 | 28% |
| 45-54 | 30% |
| 55-64 | 11% |
| 65-74 | 6% |
| 75+ | 0% |
| Denied | 0% |
| Household Income | |
| below \$25,000 | 11% |
| \$25,000 to \$49,999 | 0% |
| \$50,000 to \$74,999 | 22% |
| \$75,000 to \$99,999 | 17% |
| \$100,000 to \$149,999 | 6% |
| \$150,000 or greater | 28% |

Source: Choice Survey 2002, ¹ national statistics from TIA
2003 Choice Communications Systems Inc.